

## **Pilot No. 5 :     Develop Template to Streamlined Plan (CDBG-only (Abbreviated Plan))**

**Focus:** Consolidated Plan Document and Performance Reporting

### **Purpose:**

To determine whether templates will reduce administrative burden of developing ConPlan document, and if it enhances participant's ability to report on program performance.

### **Participants:**

Collier County, FL; Lake County, FL; Miami Beach, FL; Chicopee, MA; Waltham, MA; State of California

### **Pilot Description:**

This pilot would permit grantees to help develop and use a template for ConPlan submission, tracking accomplishments, and reporting. This has the potential to make the ConPlan document less cumbersome, less redundant, more useful, and easier for citizens to understand and provide comment. This could also have the effect of making the citizen participation process and public comment period more meaningful.

One version of this pilot will involve developing a ConPlan template modeled on the PHA Plan template that uses check boxes and other simplified procedures. Because it is important that HUD not mandate a 'one-size-fits-all' approach, the template would contain the minimum requirement that communities can build upon. Another version of this pilot is for CDBG-Only grantees. The Cities: CDBG only working group participants think that because many components of the ConPlan address HOME, ESG, and HOPWA funding, it is important to develop an abbreviated streamlined ConPlan for communities receiving only CDBG funds.

### **Summary of Grantee Pilots:**

**Collier County, FL** will use a streamlined template to prepare the CAPER to ascertain if it reduces the administrative burden for this component

**Lake County, FL** will use the Consolidated Plan template modeled after the PHA Plan to complete their 2004-2009 ConPlan. This CDBG-only grantee will use the CDBG-only version of the template.

**Miami Beach, FL** will explore how streamlined data and narrative information can provide an easily readable document that can be used by citizens, other city staff, and local HUD office to understand activities and projects.

**Chicopee, MA**, (CDBG-only grantee) would include a streamlined template that tracks progress toward meeting their five-year goals in their Annual Action Plan.

**Waltham, MA** would include a streamlined template that tracks progress toward meeting their five-year goals in their Annual Action Plan.

**State of California** is working in conjunction with the San Francisco Field Office and has an approved pilot with the following objectives:

- ▶ Eliminate requirement for CDBG PER
- ▶ Standardized definitions and required data components
- ▶ Eliminate need for duplicative recordkeeping necessary for CAPER preparation for all programs
- ▶ Identify key performance data indicators common across all four programs
- ▶ Develop standardized more user-friendly format, tabular-driven with brief data, performance summaries; extending CAPER submission deadlines

### ***Pilot No. 5 Status as of October 31, 2003***

***Chicopee, Waltham, and Quincy, MA*** evaluated how useful the streamlined template is to track progress toward meeting their five-year goals, reduce administrative burden of developing the ConPlan document, and enhance their ability to track and report on program performance.

***Lake County, FL*** developed a Consolidated Plan template modeled after the PHA Plan and plans to use the template to complete their 2004-2009 ConPlan.

***Collier County, FL*** used a streamlined template to prepare the CAPER to ascertain if it reduces the administrative burden for this component. CAPER was submitted for FY 2002 to Field Office for review. County indicated template format provided better access to performance measures, accomplishments, etc.

***Miami Beach, FL*** explored how streamlined data and narrative information can provide an easily readable document that can be used by citizens, other city staff, and local HUD office to understand activities and projects.

***State of California*** is working in conjunction with the San Francisco Field Office and has an approved pilot, more information is forthcoming on this pilot.